

# Effective Meetings Best Practices

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# Effective Meetings Best Practices

There are any number of ways to create meetings that are both effective and engaging. This is not meant to be an all-inclusive list, as there are numerous ideas that can work for certain individuals. This document should serve as a starting point and allow for deeper thought, discussion, and holding one another accountable through our actions to make every meeting thought provoking and engaging.

## Planning the Meeting

Winging meetings is not a recipe for sustained success. Creating a plan that will meet or exceed the meeting objectives is the first step in having an effective meeting. Following are some actions to take to work toward the end goal of an effective meeting. Actions specific to remote or hybrid teams are listed in italics.

- Determine the meeting objective(s).
- Use accurate terminology—is this a webinar, presentation, information share, status update, or meeting?
- Determine who should attend the meeting.
- Craft an agenda. Include informal time to gain or retain personal connections.
- Assign roles such as facilitator, note-taker, and timekeeper.
- Assess whether breakout or small groups as needed.
- Plan out how to address different communication preferences. DISC training is a great resource for this.
- Share out meeting materials and agenda at least two days in advance.
- *Share out meeting link.*
- Test equipment and audio shortly before the meeting start time.



## Outside of the Box Thinking

Sometimes straightforward solutions do not cover all the possible options. Here are some additional planning options to consider.

### Use the Amazon Memo Method

To ensure everyone is on the same page, Amazon began sharing out narratively structured memos (theirs clocked in at six pages) that were subsequently shared among meeting attendees and read silently at the beginning of each meeting. The memo allowed everyone to gain their focus on the topic(s) at hand and served as the launch into the discussion portion to arrive at what decisions needed to be made. If you or your team can craft a summary of ideas and agree as to what conversations need to take place, this method could easily be adapted.

### Enact the Dropbox Engineers Plan

Around 2013 or so, as reported by Inc., Dropbox engineers were spending more than half of their time in meetings. After listening to feedback, leaders cancelled all team meetings for two full weeks and termed it Armeetingeddon. After that two-week period, leaders asked supervisors and team members to determine whether they should reinstate all, some, or none of the recurring meetings. This forced each meeting to be reconsidered through a different lens, and those meetings that resumed had a renewed focus and purpose. Maybe you can enact this or something similar to regain focus and achieve what truly is important.

## During the Meeting

Enacting a meeting plan plays a critical role in building an effective meeting. But what happens during the meeting is just as important. Consider that engagement is markedly higher when participants take good notes. While you may assign the role of creating meeting minutes, each individual has their own takeaways that apply to their role and situation. Here are some additional considerations for actions to take during the meeting.

### Facilitator Role

The meeting owner may complete some of these actions, but if the meeting facilitator is someone else then make sure to:

- Introduce guests or newcomers.
- *Notify participants if you intend to record.*
- Ensure discussions stay on topic.
- Maintain meeting integrity.
- Encourage participation and seek engagement. *This includes using webcams so people can see all participants, which increases the likelihood of interactivity.*
- Summarize what is heard as appropriate.
- Wrap when the meeting ends, not the time. Discourage using filler to get to the end of the meeting time—if you achieve what you want in a shorter amount of time, reward this by giving time back to the participants



## Determine and Lay Out Meeting Rules

Setting rules of engagement is usually done at the onset of a series of meetings. Rules can be revisited as necessary, such as when new members join the meeting. Here are some common rules to consider:

- *Mute until you're ready to speak.*
- Avoid making excessive noise, such as crumpling of paper when the microphone is for the room use.
- Start comments and questions by stating your name.
- Identify what collaboration tools will be used in the meeting.
- Direct questions to a specific individual.
- Establish when and how to interrupt, such as raise your hand.
- Use a "parking lot" for ideas and topics not related to the meeting's purpose or agenda.

- Build a safe environment where participants can call out others who use poor meeting etiquette.

### Ideas to Increase Inclusivity

- **Have people write down their questions during the meeting.** Collect them and go over them as a group. This can help introverts, or those who don't feel comfortable speaking up, get their concerns addressed.
- **Break people into groups and have them accomplish small tasks, or make decisions, together.** Then have them share their findings with the larger group.
- **Break the meeting into sections with a different person leading each section or part of the agenda.** Switching up presenters helps refresh people's attention span and encourages attendees to feel ownership over a topic or project.
- **Develop new leaders by handing over the gavel.**

### After the Meeting

The last piece to effective meetings is doing what was agreed to do.

- Share out meeting minutes.
- Conduct follow-up as necessary.
- Complete action items. Often the updates can lead to items for the next meeting agenda.

Action Items	Owner(s)	Deadline	Status
[Action item]	[Name(s)]	[Date]	[Status, such as In Progress or Complete]
[Action item]	[Name(s)]	[Date]	[Status, such as In Progress or Complete]
[Action item]	[Name(s)]	[Date]	[Status, such as In Progress or Complete]
[Action item]	[Name(s)]	[Date]	[Status, such as In Progress or Complete]
[Action item]	[Name(s)]	[Date]	[Status, such as In Progress or Complete]

- Seek out feedback. Identify on a regular basis what has worked and what has not so engagement level.

### Go the Extra Mile

Regularly seek feedback on what is and is not working. What constitutes a productive and effective meeting can vary amongst individuals. Checking in allows for new insights and improvement suggestions.